



Receiving and processing CPS Intake (INT) stages is a regular part of the work for Local Departments of Social Services. This tip sheet, for district staff that process CPS Intakes, describes how to handle the typical scenarios that may arise.

Processing an Intake

Before accepting, rejecting, or re-assigning a Primary assignment on a report from the SCR, review the Intake Report and consider the following:

- If the report is an **Initial (INI)** and the address of the MA/AB child is in your county/jurisdiction, **accept** the report. If it is not in your jurisdiction, **reject** the report.
- If the report is a **Subsequent (SUB)** because the case appears open in CONNECTIONS in your county, but services are no longer being provided and the family no longer lives in your jurisdiction, complete the following steps:

Same Business Day:

1. Close the case in CONNECTIONS.
2. Void the pending merge, following the instructions in section **A** of this tip sheet.
3. Call the county where the family currently resides. If the county where the family now resides agrees with the re-assignment, **accept** the report and reassign.
4. Otherwise, **reject** the report with the following rejection reason: *“Case #12345... is closed. Family no longer resides in District (#99).”*

If the report is transmitted after normal business hours

and is acknowledged in CONNECTIONS the **next business day** (i.e., after the merge has been completed):

1. Perform a case split, following the instructions in section **B** of this tip sheet.
2. Call the county where the family currently resides. If the county where the family now resides agrees with the re-assignment, **accept** the report and reassign.
3. Otherwise, **reject** the report with the following rejection reason: *“Case #12345... is closed. Family no longer resides in District (#99).”*
4. The following day, close the case in CONNECTIONS.

(A) Voiding a Pending Merge – Same Business Day

Note: This requires the Merge/Split business function.

Voiding a pending merge on the same business day changes a Subsequent (SUB) report to an Initial (INI), with a *new* Case ID number.

1. From the **My Workload** tab, select the case you wish to void and click on the **Case Summary** link in the navigation pane. *The Case Summary window displays.*
2. Select the Stage Name and click on the **Case Merge/Split** link in the navigation pane.

The Case Merge/Split window displays with a **Y** in the Pending column for the report to be merged.

PEND	Name Case To	ID Case To	Name Case From	ID Case From	Date Split	Staff Name - Split	Staff ID - Sp
Y	Hill, Jean	35300146	Hill, Jean	35300147	06/13/2011	Wilson69, Darryl	15068

Count = 1

Void Pending

3. Select the report and click the **Void Pending** button.

4. Click the **Save & Close** button.

The Case Summary window displays.

5. Click the red **X** in the upper right to return to the **My Workload** tab.

The pending merge has been voided.

(B) Case Split – Next Business Day

Note: This requires the Merge/Split business function.

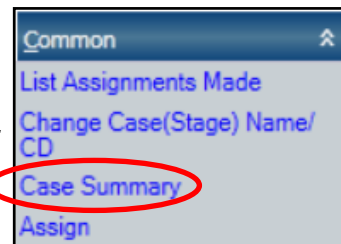
A case split on the next business day creates a separate Case ID number for jurisdictional reassignment. A case split is used when a report has been merged to an existing Case ID number through the overnight batch update process.

1. From the **My Workload** tab, select the case you wish to split.

2. Click the **Case Summary** link in the navigation pane.

The Case Summary window displays.

3. Select the Stage Name and click the **Case Merge/Split** link in the navigation pane.



The Case Merge/Split window displays.

4. Select the report from the window grid (notice that two separate Case ID numbers display).

The screenshot shows the 'Merged Cases' window. The 'To' field has ID 35800132 and Name Gray, April. The 'From' field has ID 35800133 and Name Gray, April. The 'Date Merge' is 3/3/2009. The 'Staff Name Merge' is Wilson11, Darryl. The 'Split' button is circled in red.

5. Click the **Split** button.

6. Click the **Save & Close** button to return to the Case Summary window.

7. Click the red **X** in the upper right to close the window and return to the **My Workload** tab.

The case has been split and a separate Case ID number has been created.

Progressing a Stage from INT to INV or FAR



Before an Intake (INT) stage can be progressed, it must be accepted.

- If **INT** displays in the **Stage** column of the *Assigned Workload*, the

Stage Name	Stage	Type
Hill, Jean	INT	INI

stage is still an Intake and has not been progressed.

- INV or FAR** in the **Stage** column indicates that the stage has already been stage progressed.

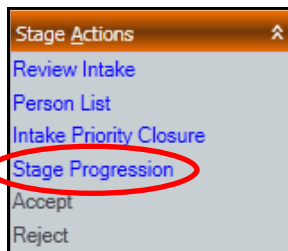
Duplicate (DUP) reports are not be stage progressed (see section C).

To stage progress an Intake:

1. From the **My Workload** tab, select the Intake (**INT**) stage.

- Click the **Stage Progression** link in the navigation pane.

The Stage Progression window displays.



- Click the **Save & Close** button.

The following message displays: "This will create a new stage of service. Remember to reassign. Continue?"

- Click the **Yes** button.

The My Workload tab displays.

The stage has progressed from Intake (INT) to Investigation (INV) (or FAR participating counties only).

(C) Closing a Duplicate Report

- From the **My Workload** tab, select the duplicate (DUP) stage you wish to close.

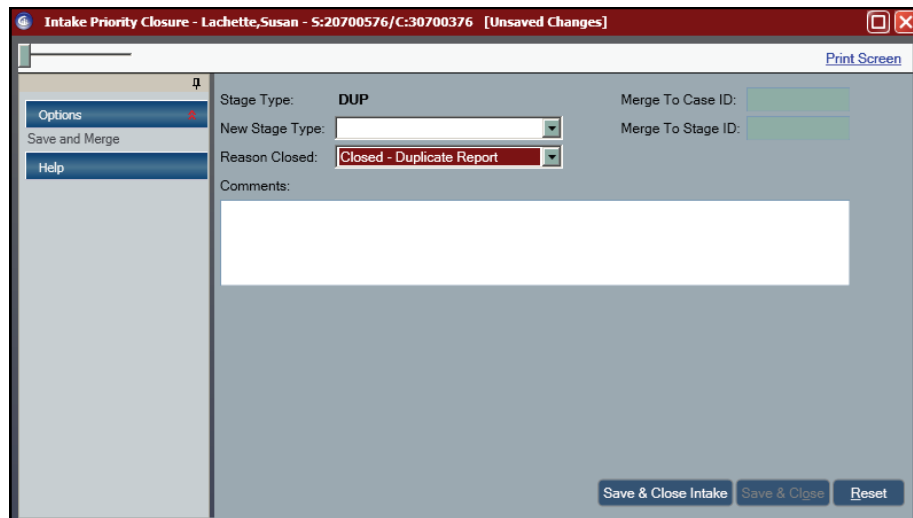
<input checked="" type="checkbox"/>	New	!	Stage Name	Stage	Type	Role
<input checked="" type="checkbox"/>			Lachette,Susan	INT	DUP	PR

- Click the **Intake Priority Closure** link in *Stage Actions* section of the navigation pane.

The Intake Priority Closure window displays.

- Use the drop-down arrow in the *Reason Closed* field to select **Close Duplicate Report**.

- In the **Comments** field, record: "For information regarding the allegation contained in this associated Intake Report, please see the Investigation Summary Report for Investigation (INV) Stage ID # ____."



- Click the **Save and Close Intake** button.

The Intake Priority Closure window closes and the My Workload tab displays.

The duplicate report no longer appears on the workload, but may be viewed from the **Case/Stage Events** tab.

Resources

- CONNECTIONS Job Aids and Tip Sheets:
<http://ocfs.state.nyenet/connect/jobaided/jobaided.asp>
- CONNECTIONS Regional Implementation Staff:
<http://ocfs.state.nyenet/connect/contact.asp>
- CONNECTIONS Application Help Mailbox:
ocfs.sm.conn_app@ocfs.state.ny.us
(NOTE: address contains an underline)

A Helpdesk ticket is now required before sending requests to the Triage Unit. This can be acquired by emailing FixIt@its.ny.gov.

ITS Enterprise Service Desk
1-844-891-1786